



CAGP Presents  
**Gift Planning Fundamentals**  
Q &A



**Would you like to ‘dip your toes’ into the world of Gift Planning?**

*Are you new to gift planning and wanting to learn the basics?*

*Are you an executive director or board member who is interested in starting a gift planning program at your charity but need to learn more before ‘jumping in’?*

*Or, perhaps you want to add some gift planning ‘tools and techniques’ to support your donors in expanding and enhancing their philanthropy.*

If so, this course might be exactly what you need.

Here’s an overview designed to help you decide if this course is right for you.

**Why is CAGP offering this course?**

As Canada’s foremost educator in charitable gift planning, CAGP has an experienced faculty of seasoned fundraisers and professional advisors who have been teaching comprehensive gift planning courses for years. Our courses have traditionally been three to five-day intensive retreats, but a few years ago – in response to market demand – we decided to create this introductory-level offering.

We also understood that not all individuals or charities are able to attend the more intensive gift planning courses, or may not fully see the ‘return on investment’. And so, *Gift Planning Fundamentals* (formerly *Gift Planning – All in a Day*) was created.

This one-day, introductory course is specifically designed to provide a **basic understanding of gift planning**. At only \$315 for CAGP members (\$350 for non-members), this course provides an economical way to gain some knowledge, sample the benefits and features of a gift planning program – and help you determine if you wish to explore this area through one of our more advanced educational offerings.



It's also a great 'first step' into a truly donor-centred approach that can enhance any fundraising program.

**Who should attend?**

Anyone who wants to gain a basic understanding of this strategic approach to fundraising, including:

- Fundraising professionals who wish to add additional gift planning 'tools and techniques', and providing value to donors, enabling them to give more by taking advantage of the generous tax benefits offered by the Canadian Government.
- Board members and/or Executive Directors who've heard gift planning is "the way of the future", and wish to learn more about this area before starting a gift planning program at their charity.
- Individuals who wish to switch careers and are considering gift planning as a profession.

**What are the learning objectives?**

- To gain a basic understanding of the most common gift planning vehicles in Canada (gifts donors make during their lifetime or through their estate).
- To learn about the latest philanthropic trends in Canada.
- To acquire an increased level of comfort and confidence in raising and discussing various gift options with donors, professional advisors or other charity colleagues and volunteers.
- To understand and be able to explain (as in conversations with donors) the basic concepts of tax and timing issues relating to donations.
- To be part of a stimulating, challenging and informative learning experience.
- To increase your network of gift planning colleagues.

**What will be covered in the *Gift Planning Fundamentals* course?**

In a nutshell, we've designed this course to cover the basic building blocks of a solid gift planning program. Below is a **sample agenda** for the day.



### SAMPLE AGENDA

- **Current Trends & Basic Tax Information**
  - Canadian philanthropic trends re: gift planning, and latest developments
  - Overview of Canadian charity law and basic tax concepts
  - Diving into the tax treatment of the two most common gifts:
    - Donations of Cash & Donations of Securities
  
- **Gift Planning Vehicles** and their tax treatment, benefits to donors, receipting and administration requirements, including:
  - Bequests & Estate Administration
  - Registered Assets (RRSPs/RRIFs/TFSA)
  - Charitable Life Insurance
  - Donations to Donor Advised Funds
  - Gifts In Kind
  
- **Marketing Across the Gift Planning Cycle**
  - Identifying Prospects & Developing Marketing Strategies
  - Donor Engagement & Relations from Cultivation to Closure
  
- **Ethical Considerations**
- **Starting & Managing Your Gift Planning Program (including the *small shop model*)**
- **Working with Professional Advisors**

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#### **In addition to receiving this information, are there other benefits?**

1. As with all CAGP courses, our **experienced faculty** bring a wealth of skills, knowledge and experience that participants can tap into as the day unfolds.
2. Participants will engage with one another in reviewing and solving case study dilemmas and ethical concerns. The chance to **network with others** on the same journey as you can be a valuable resource for future exploration and discussions.
3. And the price **includes breakfast, lunch, coffee breaks and course materials.**

#### **What is not offered in this course?**

At **CAGP** we offer a range of gift planning courses; therefore, to help participants make that final decision on where to invest their valuable resources, you are encouraged to read through the material to ensure this course will meet your objectives.

The content of this course deals with an overview of key areas of gift planning – **at an introductory level**. For individuals who are looking for more in-depth, technical, and



advanced knowledge regarding topics like the tax treatment of the various gift planning instruments, complex gift structures, policy development, budgeting or reporting you may wish to consider our other educational offerings. Or, please feel free to contact us at [ekuhns@cagp-acpdp.org](mailto:ekuhns@cagp-acpdp.org) to ask for more information.

**Who will be teaching the *Gift Planning Fundamentals* course?**

*Gift Planning Fundamentals* faculty members are senior fundraising professionals who have taught CAGP Gift Planning courses and have direct experience as gift planning professionals. See our website to learn about the faculty presenting each course.

**How much does the course cost?**

CAGP Members: \$315

Non-members: \$350

This includes course materials, a light breakfast, lunch and coffee breaks.

**Where will it be held?**

*Gift Planning Fundamentals* is held every year as a pre-Conference event the day prior to our Annual National Conference. We also hold this course in various Canadian cities throughout the year, hosted by our local RoundTables. Check with your local [RoundTable](#) to see if there is one in your area coming up soon.

We also offer the option to hold an in-house *Gift Planning Fundamentals* targeted and adapted specifically to your audience. Should your company or organization wish to present a *Gift Planning Fundamentals* course to your staff and/or volunteers, please contact Erin Kuhns, Professional Development Coordinator at [ekuhns@cagp-acpdp.org](mailto:ekuhns@cagp-acpdp.org).

**Will I receive CFRE credits for this course?**

Yes, you will receive between 6 and 8 CFRE credits for this course. Please check with each course to see how many CFRE credits will be offered, as the times and number of credits may vary slightly.

**Who can I contact for more information?**

Erin Kuhns, Professional Development Coordinator

[ekuhns@cagp-acpdp.org](mailto:ekuhns@cagp-acpdp.org)

1-888-430-9494 or 613-232-7991 Ext. 222